

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

Matthew W. Donald

Founding Attorney

Jennifer M. Moore

Attorney

Bethany Peters

Office Manager

Ambreanna Cyrus

Benefits Coordinator

Kendra Crowell

Receptionist

May Update:

"Spring: a lovely reminder of how beautiful change can truly be"

We can help you be prepared and give you that sense of calm while helping you plan for your future and showing your loved ones how much you care!

Call or email us today to set up a **FREE** consultation!

Office Location

719 West Market Street
Baltimore, OH 43105

Phone

(740) 400-4194

Fax

(740) 400-4195

E-mail

info@donaldlawoffice.com

Website

www.donaldlawoffice.com

The Coronavirus Tax Relief and Economic Impact Payment and its effect on Medicaid

We are living through strange and stressful times, to be sure. We have all struggled to navigate through the "new normal" as we distance ourselves from family and friends and search for the ever-elusive toilet paper.

However, one of the positives to arise from this pandemic is The Coronavirus Tax Relief and Economic Impact Payments, a.k.a. stimulus checks.

Eligible individuals with adjusted gross income up to \$75,000.00 a year are set to receive \$1,200.00, while married couples with an adjusted gross income of up to \$150,000.00 a year will receive \$2,400.00.

This does include most Social Security and Railroad Retirement recipients not typically required to file a tax return. The first of these deposits hit accounts on April 15th, 2020.

As great as this sounds, for many individuals who receive Medicaid benefits, this poses a major potential problem.

In order to remain eligible for Medicaid benefits, individuals are allowed to have no more than \$2,000.00 of assets in their possession at any given time (not including excludable resources).

Typically, if a lump sum is received, bumping them over the \$2,000.00 threshold, the Medicaid recipient must spend down their assets to below \$2,000.00 in the same month the money was received.

If they fail to do so, that excess money becomes an asset, and Medicaid benefits will be suspended until the individual is once again under \$2,000.00 and otherwise qualified.

This *could* result in a Medicaid overpayment if Medicaid is not properly notified of the excess resources, hence potentially resulting in severe consequences such as the requirement of privately paying the nursing facility for

the time they were not technically Medicaid qualified.

Now for the good news! In a webinar conducted by the Ohio Department of Medicaid on April 15, 2020, it was stated that the stimulus checks will **not** count as income and will **not** be considered a resource for 12 months.

This will allow individuals receiving Medicaid benefits an entire year to spend their stimulus check on qualifying purchases without fear of losing their benefits.



DONALD
LAW OFFICE, LLC
WILLS, ESTATE, VA & ELDER LAW

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

Office Happenings

As we continue to navigate the Coronavirus crisis, our main focus is still keeping our staff and clients safe and healthy, while still supporting them in their estate planning needs.

Our office has been extremely lucky to be able to remain open to service the needs of our clients as an essential business.

As we move past the surge of new cases in Ohio, we will be adjusting our office hours

and operations in a manner that allows us to better operate but at the same time ensures the safety of our staff, our clients and the continuity of the business.

Starting May 4, 2020, our office will be back to its regular office hours of Monday – Friday from 9am to 5pm.

For the time being, to further help limit the spread of the Coronavirus, we will continue to keep our office closed to walk-ins. In lieu of

in office appointments, we will continue to utilize video and telephone conferences to meet with clients. We are also conducting “drive up” signing appointments to further limit exposure, while allowing us to witness and notarize documents.

As guidelines and restrictions change, we will continue to update you on our office operations and office hours. We hope you all stay safe and healthy!

Staff Spotlight

This month's Staff Spotlight will be focused on Bethany Peters.

Beth is the Operations Manager here at Donald Law Office. She is a graduate of Ohio Christian University where she earned a Master's Degree in Business Management, with

a Healthcare Administration minor.

Beth works hard to run the day-to-day operations of our office, as well as assist the attorneys with our client's Probate and Estate Planning needs. She is very dependable, and if you want something done, just ask! She will make sure it gets completed!

Beth was born and raised in Lancaster, Ohio. In her free time, she enjoys playing her bass guitar, spending time with her Boxer, Payton, and spending time with her nephews.

Through this quarantine, she also found a new love for relaxing in her hammock and enjoying the outdoors.

Matt's Message

With all of the changes we've put in place in order to weather the Coronavirus storm, we are so pleased to hear that Ohio has lessened the curve and Governor DeWine has begun to slowly “reopen” the state.

As Ohioans begin to come out of quarantine, we want to remind you all of the importance of Estate Planning.

Oftentimes clients ask when they should establish their estate plan. We believe that you should start your estate planning as soon as you have the legal authority to do so.

For example, we tell people that

the basic estate plan is vital to those who want to make sure that someone can speak for them if they become incapacitated. Think of it this way: you're 18, you're off to college or a new job, and you are seriously injured in a car accident and you need to have someone represent you in a lawsuit (either as a defendant or a plaintiff). Who is going to be able to do that? The parents? The wife/husband? Not necessarily.

First there will need to be a guardian appointed to determine who that individual will be. It's not automatically the parent or spouse of the injured person.

When my daughters turned 18, I

stressed to them the importance of getting their estate planning documents in place and had them sit down with another attorney in the office to ensure their wishes were legally put in writing.

Everyone will need an estate planning attorney eventually. You can either meet with one when you are healthy and able to make choices, or someone will meet with an estate planning attorney on your behalf when you are no longer able to make choices. Or, someone will meet with an estate planning attorney on your behalf when you pass away. Everyone meets with us eventually. Sooner is always better to ensure your wishes are in place.

Quote of the Month:

“Spring will come and so will happiness. Hold on. Life will get warmer.
-Anita Krizzan



At Donald Law Office, we guide you through your entire estate planning and long-term care journey!

Our Mission is to provide peace of mind to you and your loved ones.



Office Location:

719 W. Market Street
Baltimore, OH 43105
(740) 400-4194

info@donaldlawoffice.com
www.donaldlawoffice.com